

Content Services Platform solution checklist



Introduction

You know why you're here. Staff are tired of dealing with paper-based approvals and workflows, just because "that's the way it's always been done". Now, filing cabinets are overflowing, or your online and offline files are just too hard to find.

Think about document management at your organisation. Are employees:

- Inputting data manually?
- Storing files in multiple locations, both physically and digitally?
- Spending time searching for the information they need?
- Physically walking documents from one part of the office to another in order to action the next part of the workflow, such as, for example, getting an authorising signature?
- Double-handling documents?

While each of these activities might not take up much time individually, collectively and spread across the business, this quickly adds up to hundreds of hours that could otherwise have been spent on revenue-generating activity.

A Content Services Platform solution can work to streamline document workflows, because it:

- Eliminates the need to manually input data;
- Stores and tags all documents stored in a central location, avoiding needless duplication;
- Has a simple yet powerful search function, so users can quickly find the information they need; and,
- Digitises and automates businesses processes, thereby optimising workflows, eliminating double-handling and physical transport requirements.

How to find the right Content Services Platform for your needs

A Content Services Platform isn't a system that you can choose on the fly - it will affect the way documents are managed right across your organisation, so it's going to change the way people work.

This is why, before you start going to market to look for a Content Services Platform solution, you should understand what this involves.

Welcome to the Content Services Platform Checklist - your complete guide to finding the right Content Services Platform solution for your business. Read on to discover how to:

- Define your organisation's needs.
- Discover what other Content Services Platform solution similar businesses are using.
- Review online sources to assess fit and quality of available solutions.
- Prepare thoroughly for product demonstrations, leaving no stone unturned.
- Shortlist and compare your vendors' functionality accurately.
- Provide the right information to get accurate quotes so you can make your final business decision.

We hope you find this checklist helpful.

Chapter 1: Define your organisation's needs

Instead of thinking of a Content Services Platform solution as purely a document storage and findability solution, think of it as a way to manage documents throughout their entire workflow cycle - from creation to disposal.

Security is another factor, as having a Content Services Platform solution will help you to protect sensitive data, ensuring that the right people have access to the right data at the right time.

This way, you'll be more readily able to identify business processes that can be supported by your Content Services Platform solution, and therefore be in the running to find the right solution.

Achieving positive ROI depends on deploying a unified Content Services Platform solution across departments and workflows - from accounts payable to HR onboarding and beyond.

1. Define Business Objectives & Use Cases

Before evaluating platforms, clearly identify your organisation's goals:

What manual, paper-based, or inefficient processes need to be improved?	☐
Which departments will benefit most (e.g. Finance, HR, Operations, Legal)?	☐
What are your priority use cases (e.g. invoice processing, contract management, onboarding)?	☐
What measurable outcomes are expected (cost reduction, faster turnaround times, improved compliance)?	☐

2. Intelligent Capture & Ingestion

Assess how effectively the platform can bring information into the system:

Does it support multi-channel capture (scanning, email, mobile, watched folders, integrations)?	☐
Can it automatically classify and index documents?	☐
Does it use OCR and data extraction to capture key information (e.g. invoice data, forms)?	☐
Can it handle high-volume document processing?	☐
Does it integrate with multifunction printers (MFPs) and business applications?	☐

3. Document Management & Content Control

Evaluate how content is stored, organised, and accessed:

Is there a centralised, secure, and searchable repository?	☐
Are advanced search capabilities available (full-text, metadata, filters)?	☐
Can documents be organised using custom metadata and taxonomy?	☐
Does the system support version control, check-in/check-out, and document history?	☐
Are role-based or personalised views available for users?	☐

4. Workflow & Process Automation

Determine how well the platform automates business processes:

Can workflows be designed using a visual/no-code interface?	☐
Does it support rules-based routing, approvals, and notifications?	☐
Can it manage multi-step, cross-department processes?	☐
Are SLA tracking, escalations, and task queues supported?	☐
Is there visibility into process status and workload distribution?	☐

5. Digital Forms & Data Collection

Assess capabilities for structured data capture at the source:

Can you build no-code digital forms?	☐
Are forms mobile-friendly and accessible externally?	☐
Is data validation applied at the point of entry?	☐
Can submitted data automatically trigger workflows and document creation?	☐
Can forms integrate with existing systems and databases?	☐

6. Integration & Interoperability

Ensure the platform works within your existing ecosystem:

Does the platform offer API-based integration?	☐
Can it connect to key systems (ERP, CRM, HR, finance platforms)?	☐
Is there support for no-code / low-code integrations?	☐
Can it enable bi-directional data exchange?	☐
Does it support event-driven automation across systems?	☐

7. Security, Governance & Compliance

Evaluate the platform's ability to protect and control information:

Are granular, role-based access controls available?	☐
Is there a complete audit trail of document and user activity?	☐
Can you define and enforce records retention policies?	☐
Does the platform support secure sharing and external access controls?	☐
Are compliance requirements (e.g. data privacy regulations) supported?	☐

8. Cloud, Mobility & Accessibility

Review deployment flexibility and user accessibility:

Is the platform available as a cloud (SaaS) solution?	☐
Can users securely access content from any device or location?	☐
Does it support remote work and distributed teams?	☐
Are updates and maintenance handled automatically?	☐
Is scalability aligned with business growth?	☐

9. Analytics & Process Insights

Measure how well the platform supports continuous improvement:

Are there real-time dashboards for workflows and processes?	☐
Can you identify bottlenecks and inefficiencies?	☐
Are there reports on user activity and productivity?	☐
Can you track process performance against SLAs?	☐
Does the platform provide insights to support data-driven decision making?	☐

10. User Experience & Adoption

Ensure the platform will be widely adopted:

Is the interface intuitive and easy to use?	☐
Can users complete tasks with minimal training?	☐
Are workflows and actions logically structured?	☐
Is there support for role-based experiences?	☐
Does the platform reduce, rather than add to, user effort?	☐

11. Vendor Capability & Support

Evaluate the provider beyond just the technology:

Does the vendor have proven implementation experience?	☐
Are there local support and training resources available?	☐
What are the implementation timelines and methodologies?	☐
Are there reference customers or case studies?	☐
What are the ongoing support, upgrade, and pricing models?	☐

Chapter 2: Understanding which Content Services Platform solution similar businesses use.

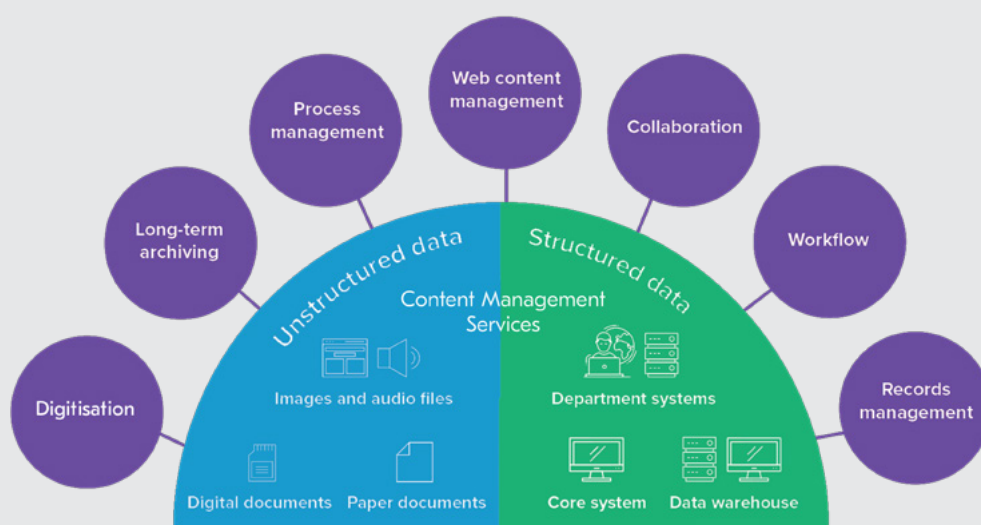
Identify the Content Services Platforms used by similar businesses. Where there's strong adoption of a particular solution, it's a good indicator to evaluate that vendor more closely.

Chapter 3: Review online sources to assess fit and quality of available solutions

There is a wealth of credible online data that will help you to evaluate vendors in different ways. You may choose to:

- Review marketing collateral, case studies, how-to videos, and client lists from vendor sites.
- Take a look at online reviews of the product itself, but also of vendors' implementation, support and service functions.
- Use comparison charts as a helpful way to narrow down your search based on functionality.

Online research will help you validate what you find out from industry peers, and compile a list of questions to ask each vendor when you are ready to speak to them.



Chapter 4: Request a demo

Seeing is believing - which is why demos are an imperative part of the selection process. Preparedness in this phase will help you to get a demo that is tailored to your environment and needs. This will also assist in buy-in, as you'll invite the key stakeholders involved in this decision, implementation and ongoing adoption and use.

You'll want to ensure that:

- Live demos involve employees across all of the departments that typically touch any given document.
- A demo can involve some participation, for example, an employee can follow simple instructions to complete a task in the system with ease, with minimal training and demonstration.
- You live-test a few functions that will prove ease-of-use when it comes to performing your business-critical tasks within the system.

This will help to make sure that your Content Services Platform is covering all the possible requirements across the organisation.

Chapter 5: Shortlist vendors

By this stage, you're likely ready to shortlist two or three vendors from your list of targets. Whatever your critical requirements are, your shortlisted vendors will deliver on these.

You'll be sure the products all meet your functional needs, service and support has a good reputation, the product is easy enough to use and adopt, security is enterprise-grade, and integration is up to industry standard.

Before you start comparing prices, however, you might want to do the following:

- Hold reference conversations with decision-makers in other similar organisations (be sure to ask about the unexpected costs or impacts during their project - so you don't make the same mistakes!)
- Take a close look at implementation and consulting services and their costs.
- Review comparative service response times.
- Identify the support programs that will be closest suited to your needs.
- Understand the change request process and cost implications for each vendor.
- Do a review of the system and hardware/software required from both an investment and a compatibility standpoint.
- Check the financial viability of the vendor.
- Understand the payment terms.
- Review whether the product you're looking at is in the core business area of the vendor.

Once you've completed these checks, it is likely you'll see one vendor leads the fray in terms of suitability. But how much will it cost you, and how quickly can the system be implemented?

Chapter 6: Give information for quoting and comparing systems

This brings you to the quoting stage. Vendors will all have different cost and quoting structures, making it difficult to compare products directly. There are initial set-up costs, ongoing charges, sometimes a per-user charge - not to mention technical support fees and update charges. Some may be all-in-one pricing models while others are modular in their pricing, which can additionally make it hard to compare.

Don't just rely on the quotes without understanding every line or possible charge, and this is a very good stage to get strong at your questioning. For any cost that can't be specifically quoted until a later stage, ask for ranges for similar sizes of organisations. Or even better, set up a pricing table that includes, for your basic business critical functions:

- Installation costs.
- Annual / ongoing license fees for X number of users.
- Annual support packages.

This way you can compare apples with apples.

Choosing the right Content Services Platform solution for your business can be challenging - but we hope our this checklist has helped simplify the process.

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